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Required Report - public distribution

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## Morocco

### Retail Foods

**2018**

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**Report Highlights:**

Morocco, a U.S. Free Trade Agreement partner, is a price-sensitive market that to-date has not yielded significant quantities for U.S. food and beverages in the retail sector. In 2017, U.S. exports of retail-related products to Morocco totaled only \$23 million while Post identified only scant volumes of U.S. tree nuts, seafood, sauces, and spirits available on select Moroccan retail shelves. Best prospects include: seafood, beer, wine & spirits, almonds, pistachios, dried fruit, food preparations, protein concentrates, cheese, chocolate & confectionary, and dog & cat food.

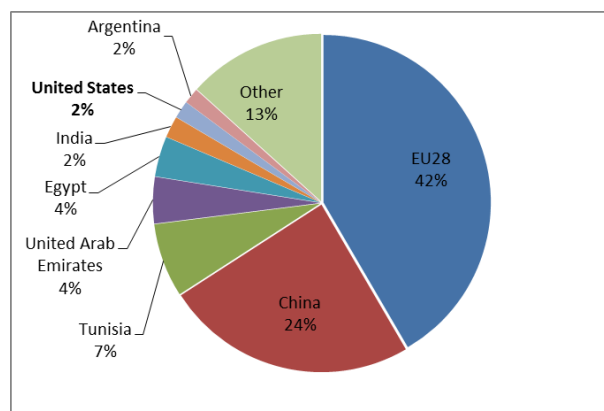
## Market Fact Sheet: Morocco

### Executive Summary

Morocco, a U.S. Free Trade Agreement partner, is a price-sensitive market that does not showcase significant quantities for U.S. food and beverages in the retail sector. In 2017, U.S. exports of retail-related products to Morocco totaled only \$23 million. At present, Post has identified only scant volumes of U.S. pre-packaged tree nuts, seafood, sauces, and spirits available on select Moroccan retail shelves.

### Imports of Retail Food Products (2015-17 Average Imports)

Morocco imported \$1.0 billion worth of retail-related food products in 2017. The United States faces stiff competition from the European Union.



Sources: Office des Changes

Strengths	Weaknesses
Expanding volumes through and coverage of modern distribution channels and retail outlets	Distance and lack of shipping lines
Opportunities	Challenges
US-Morocco FTA provides preferential market access	Erosion of U.S. preferences vis-à-vis Morocco's FTAs with the EU and Arab League; EU-like import requirements

### Quick Facts CY 2017

**Imports of Retail-Related Food Products:**  
\$1.0 billion

#### Top 10 Best Retail Products

- Beer, Wine & Spirits
- Food Preparations
- Protein Concentrates
- Dog & Cat Food
- Chocolate & Confectionary
- Cheese
- Almonds
- Pistachios
- Dried Fruit
- Seafood

#### Food Trade (U.S. billion) 2017

Food Exports	\$4.6
Food Imports	\$5.7
Food Retail Industry	\$13.3

#### Top Morocco's Retailers

- Marjane Holding (Marjane and Acima)
- Label'Vie (Carrefour, Carrefour Market, and Atacadao)
- Ynna Holding (Aswak Salam)
- BIM Stores SARL (BIM)
- Akwa Group (Minibrahim)

#### GDP/Population 2017

Population (*millions*): 35.7  
GDP (*billions USD*): \$111  
GDP per capita (*USD*): \$3,252

Sources: [World Bank](#), [Morocco Office des Changes](#), [Morocco Haut Commissariat au Plan](#), [Central Intelligence Agency \(CIA\)](#), [IMF World Economic Outlook](#), FAS Rabat office research.

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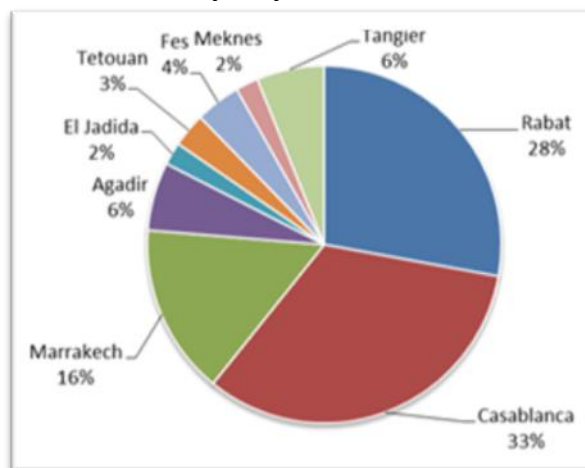
## SECTION I. MARKET SUMMARY

In 2017, Morocco's food retail market represents 12% of GDP. The Casablanca-Rabat corridor accounts for about 50% of all modern retailers. Marjane Holding (Marjane and Acima) and Label'Vie (Carrefour, Carrefour Market, and Atacadao) are Morocco's leading modern food retailers with other notables including Ynna (Aswak Salam) and BIM.

### Recent Trends & Upcoming Events in Retail

- ✓ [Coviran](#), a Spanish group intends to enter Morocco in 2018 in Tangier and open a second store in Tetouan before the end of June 2019.
- ✓ [Marjane](#), [Label'Vie](#), and [Ynna](#) are focused on opening new outlets, including extending their reach to second-tier cities, including Taza, Beni-Mellal, Fquih, Ben Salah, Al Houceima, Kalaat, Sraghna, and Larache.
- ✓ Online grocery [epicerie.ma](#) has been renamed in [marketplus.ma](#) following the launch of physical supermarket "Market<sup>+</sup>"
- ✓ The 2<sup>nd</sup> International Exhibition of Food & Drinks «[SIAB EXPO MAROC](#)» takes place November 21-22, 2018
- ✓ Peak sales occur during Ramadan, which will take place on/about May 5-June 4, 2019

**Retail Outlets by City**



Source: [Ministry of Industry, Investment, Trade and the Digital Economy](#)

While the Ministry of Industry estimates traditional channels still account for 80% of grocery retailing, industry sources anticipate modern, large-scale distribution will support 30% of national consumption by 2025, supported by changing demographics, urbanization, and the evolution of the consumers' purchasing behaviors, which should in turn create additional opportunities for imported food products.

In 2007, Morocco's Ministry of Industry introduced the [Rawaj](#) Vision 2020 program, which aimed to modernize distribution and supply chains and boost the sector's contribution to GDP from 11% to 15%. To achieve this, the plan called for the development of 600 supermarkets and hypermarkets, as well as 15 malls and 15 outlet stores.

### Advantages and Challenges Specific to the Moroccan Retail Market

Advantages	Challenges
Growing perception that supermarkets offer safer and cheaper products.	Supply chain: (1) Retailers have leveraged past and present foreign investment into Moroccan retail by U.S. competitors (Europe, Turkey) and (2) U.S. multi-national food companies have regional production.
Expanding volumes through and coverage of modern distribution channels and retail outlets.	Market size: 35 million Moroccans, 10-15 percent of which can afford to buy imported products.
Increased acceptance of packaged food.	Entry fees for new products

### Grocery Retail Outlets by Channel in Morocco, Number





Outlet	2012	2013	2014	2015	2016	2017
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<b>Modern Grocery Retailers</b>	<b>1,759</b>	<b>1,861</b>	<b>1,976</b>	<b>2,099</b>	<b>2,231</b>	<b>2,365</b>
- Convenience Stores	142	155	169	188	205	221
- Discounters	110	165	226	280	332	391
- Forecourt Retailers	1,169	1,193	1,217	1,258	1,308	1,345
-- Chained Forecourts	48	48	50	69	105	133
-- Independent Forecourts	1,121	1,145	1,167	1,189	1,203	1,212
- Hypermarkets	52	54	63	66	69	75
- Supermarkets	283	291	299	307	317	333
<b>Traditional Grocery Retailers</b>	<b>236,784</b>	<b>237,705</b>	<b>238,712</b>	<b>239,846</b>	<b>240,569</b>	<b>241,429</b>
- Food/Drink/Tobacco Specialists	39,106	39,505	39,940	40,367	40,781	41,172
- Independent Small Grocers	164,884	165,131	165,412	165,809	166,053	166,401
- Other Grocery Retailers	32,794	33,069	33,360	33,670	33,753	33,856
<b>Total Grocery Retailers</b>	<b>238,540</b>	<b>239,563</b>	<b>240,656</b>	<b>241,950</b>	<b>242,818</b>	<b>243,794</b>

Source: Euromonitor

**Hypermarkets** have large parking lots that can fit up to 1,000 cars but are not often within walking distance. They stock over 17,000 SKU in food items and are believed to account for 40-50 percent of total sales. This category is aggressive in promoting their products. They publish monthly brochures and occasional flyers where the importers promote their products.





- Marjane is especially aggressive in advertising.
- Atacadao positions itself between a hypermarket and a discounter, targeting lower-income consumers, professionals, and small retailers, including through offering bulk purchase discounts.
- Aswak Assalam has reduced its number of stores.

Retailer Name	Ownership	Est. Turnover, \$Mill, 2016	Est. # of Outlets, 2017	Locations	Purchasing Agent type
	Moroccan: SNI Group	\$1,059	38	Casablanca, Rabat, Sale, Marrakech, Meknes, Taza, Tanger, Agadir, Kenitra, Mohammedia, Safi, Tetouan, Oujda, Saidia, Nador, Fes, Khouribga, Beni Mellal, Kelaat Es-Sraghna, Saleh, Al Hoceima, Fkih Ben	Imports Direct and Buys from Importers
	Moroccan: Label'Vie-	\$300-350	11	Casablanca, Meknes, Fes, Marrakech, Mohammedia Rabat, Agadir, Oujda, Tanger	Imports Direct via Label'Vie and Buys from Importers
	95% French: Carrefour-5%	\$66-90	7	Casablanca, Fes, Rabat, Marrakech, Sale, Meknes, Tanger	
	Moroccan: Ynna Holding	\$150-200	13	Rabat, Marrakech, Agadir, Tanger, Casablanca Mohammedia, Kenitra, Emara, Oujda, Essaouira	Imports Direct and Buys from Importers

Source: Industry websites; [Moroc1000](http://Moroc1000)


**Supermarkets, Discounters, and Convenience Stores** are located in or within walking distance to medium to high-income neighborhoods and are designed to attract urban consumers from the traditional mom-and-pop shops and open-air markets. They are much smaller than hypermarkets but have a minimum of 20,000 ft<sup>2</sup> and 3 to 6 registers with limited parking space.

- ACIMA is stocks at least 5,000 items
- Carrefour Market carries stocks around 10,000 products, including 4,000-5,000 food items, including specialty products like pork and alcohol.
- Discount food outlets such as [BIM](#), which opened in 2009, have grown popular in Morocco, followed by relative new-comer [Costcutter](#). [Label'Vie](#) addresses the deep-discount market segment through its Atacadao stores – see above.
- Morocco has only independent convenience stores.

Retailer Name	Ownership	Est. Turnover, \$Mill, 2016	Est. # of Outlets, 2017	Locations	Purchasing Agent type
	<b>Moroccan:</b> SNI Group	\$163	42	Casablanca, Rabat, Tanger, Marrakech, Fes, Safi, Khouribga, Beni Mellal, Temara, El Jadida, Berrechid	Imports Direct via Marjane and Buys from Importers
	<b>Moroccan:</b> Label'Vie-95% <b>French:</b> Carrefour-5%	\$184	51	Casablanca, Mohamedia, Rabat, Meknes, Kenitra, Marrakech, Fes, Agadir, Sale, Khemissat, Settati, El Jadida, Temara, Safi	Imports Direct via Label'Vie and Buys from Importers
	<b>Turkish:</b> Groupe Birlesik Magazal A.S	\$211	335	Casablanca, Rabat, Sale	Import Direct
	<b>British</b>	N/A	1	Marrakech	n/a
Other Small Supermarkets (≥ 3 registers, >25000 ft <sup>2</sup> )	Local – private	\$50-100	30	Casablanca, Rabat, Agadir	Buys from Importers
Other Large Grocery Stores (Self-service, ≥ 1 register, < 2000 ft <sup>2</sup> )	Local -private	\$100-150	270	Casablanca, Marrakech, Rabat, Agadir	Buys from Importers

Source: Industry Websites; [Maroc1000](#)

**Gas-marts** are 500 to 3,300 ft<sup>2</sup> with one electronic register and carry mostly convenience foods, often located in or along highway rest stops connecting Morocco's major cities. Stores are usually expensive and carry some imported convenience items, including snack food, beverages, and confectionary.

Retailer Name	Est. # of Outlets 2017*	Location	Purchasing Agent
Afriquia Mini-Brahim (Managed by <a href="#">Maroshop</a> ) 	26	Casablanca, Marrakech, Agadir, Meknes, Fes, Settati	Buys from Importers

Shell Gas Stations ( <a href="#">Select Shop</a> )	25	Casablanca	Buys from Importers
Mobile Gas Stations on the Run developed by Exxon	16	Casablanca, Rabat, Marrakech	Buys from Importers

Source: Industry Websites, \*No official data is available from the Moroccan Ministry of Commerce and Industry

### Traditional Markets - "Mom & Pop" Small Independent Grocery Stores

Imported products are not well positioned in this market segment. This category includes an estimated 45,000 grocery stores that are not in the above categories. Their size varies from less than ft<sup>2</sup> to 1,000 ft<sup>2</sup>. These shops have limited financial resources and are typically managed by one person. consumer often cannot help himself in this store because the goods are behind a counter. Many of stores in the cities have a refrigerator and a very number have ice cream freezers. Convenience, proximity, and credit to the final consumer are their strongest assets. To reach small mom-and-pop stores, products can go through multiple distributors or wholesalers, and sometimes even larger retailers.



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## SECTION II. ROAD MAP FOR MARKET ENTRY

In addition to working with central purchasing platforms of large, modern retailers for high volume and/or private label orders, often the best way to introduce new products is through the handful of established importers, which still supply the majority of imported food products to modern retailers. Exporters may be able to meet Moroccan food retailers and their importers at SIAL (Paris), ANUGA (Germany), ALIMENTARIA (Spain), or Gulfood (Dubai). U.S. exporters may contact [AgRabat@fas.usda.gov](mailto:AgRabat@fas.usda.gov) to facilitate introductions.

## SECTION III. COMPETITION

Category	HS	Description	Avg Imports, 2015-17			US Duty	MFN Duty	Foreign Competitors
			World	USA	%			
Meat & Poultry	0201-0202	Beef, Chilled/Frozen	\$26,073,578	\$0	0.0%	0%/200% <sup>1</sup>	200%	EU, Aust
	0207	Poultry, Chilled/Frozen	\$984,858	\$0	0.0%	0%100% <sup>1</sup>	100%	EU, Tuni, Braz
Fishery Products	0302-0304	Fish, Chilled/Frozen	\$45,605,379	\$141,682	0.3%	0%	10%	EU, Tuni
	0306	Crustaceans	\$80,615,535	\$0	0.0%	0%	40%	EU, Cand, Chin
	0307	Molluscs	\$19,415,942	\$617,482	3.2%	0%	10%	EU, Chin
Dairy	0406	Cheese	\$72,588,744	\$2,113,551	2.9%	0%	25%	US, EU, Tuni
Vegetables	0710	Vegetables, Frozen	\$533,396	\$17,462	3.3%	0%	25%	EU, Peru, US
Fruits & Nuts	080211 - 080212	Almonds	\$2,490,410	\$1,442,996	57.9%	0%/40% <sup>1</sup>	40%	US, EU
	080250 - 080251	Pistachios	\$1,179,943	\$931,360	78.9%	0%	2.5%	US, Iran, EU
	080410	Dates	\$106,350,047	\$700	0.0%	0%	40%	Tuni, UAE
	080620	Raisins	\$684,183	\$49	0.0%	0%	30%	Iran, Uzb, Turk
	080810	Apples, Fresh	\$5,594,478	\$18,355	0.3%	0%	40%	EU, Aust
	080820 - 080830	Pears, Fresh	\$16,321,387	\$0	0.0%	0%	40%	EU, Arg, Chile
	081320	Prunes, Dried	\$305,796	\$0	0.0%	0%	30%	EU
	0902	Tea	\$203,692,742	\$59,946	0.0%	0%	32.5%	Chin, India
Coffee, Tea, Spice	0904-0910	Spices	\$34,168,225	\$51,290	0.2%	0%	2.5%	Braz, Chin, EU
Cereals	1006	Rice	\$4,579,729	\$221,787	4.8%	0%	2.5%	Thai, EU, US
Oils	150910	Olive Oil, Virgin	\$11,871,285	\$144,863	1.2%	0%	40%	EU, Tuni
Meat Products	1602	Meat & Poultry, Prep/Pres	\$8,132,264	\$483	0.0%	6.7%	40%	EU, Braz
	1604	Fish, Prep/Pres	\$7,428,678	\$85,318	1.1%	0%	40%	Sengl, EU
Confection	170490	Sugar Confection (not gum; no cocoa)	\$6,814,130	\$48,973	0.7%	0%	25%	EU, Turk, Chin
Chocolate	1806	Cocoa Food Prods (e.g., Chocolate)	\$38,625,086	\$85,998	0.2%	0%	17.5%	UAE, EU
Cereal Products	190120	Mixes & Doughs	\$2,009,599	\$17,290	0.9%	0%	10%	UAE, EU
	1904	Cereal Food Preps by Swelling/Roasting/etc.	\$12,211,137	\$15,680	0.1%	0%	10%	EU, Tury, Chin
	1905	Bread, Pastry, Cakes, Wafers, etc.	\$34,414,410	\$171,261	0.5%	0%	40%	EU, Tury, UAE
Fruit, Nut & Veg Products	200190	Prep/Pres Veg/Fruit by Vinegar (not pickles)	\$662,601	\$22,263	3.4%	0%	40%	EU, Chin
	200290	Tomato Paste	\$10,460,088	\$0	0.0%	0%	40%	EU, Egt, Chin
	2005	Prep/Pres Veg, Not Frozen	\$12,552,322	\$252,194	2.0%	0%	40%	EU, Chin
	2008	Prep/Pres Fruit/Nuts	\$10,344,299	\$740,003	7.2%	0%	40%	EU, Egt, Thai



		(not juice nor jams)						
Food Products	2103	Sauces & Condiments	\$14,697,184	\$611,597	4.2%	0%	40%	EU, Chin,Egt
	210610	Protein Concentrates	\$2,854,139	\$1,781,576	62.4%	0%	10%	US, EU
	210690	Food Preparations	\$57,417,006	\$1,875,682	3.3%	0%	10%	EU, Egt, US
Beverages, Vinegar	2202	Non-alcoholic Beverages	\$12,130,050	\$406,925	3.4%	0%	40%	EU, Turk
	220300	Beer	\$4,495,025	\$1,340,422	29.8%	0%	49%	EU, Mex, Rus
	2204	Wine	\$16,655,284	\$149,713	0.9%	0%	49%	EU, US, Rus
	2208	Spirits & Liqueurs	\$30,669,896	\$2,144,607	7.0%	0%	49%	EU, US, Rus
	220900	Vinegar	\$1,540,985	\$12,326	0.8%	0%	40%	EU, Chin
Petfood	230910	Dog & Cat Food	\$7,325,043	\$184,998	2.5%	0%	2.5%	EU, Turk
Ess Oils	3301	Essential Oils	\$1,258,425	\$13,522	1.1%	0%	25%	EU, Chin
<sup>1</sup> Subject to Tariff-Rate Quota								

## SECTION IV: BEST PRODUCT PROSPECTS

### Products present in the market that have good sales potential:

- No U.S. packaged food or beverages are present in significant quantities

### Products not present in significant quantities but which have good sales potential:

- Almonds, Pistachios, Walnuts
- Prunes, Raisins, Cranberries
- Rice
- Pulses
- Apples
- Canned Fruit and Vegetables
- Dairy Products
- Frozen food, including Seafood
- Breakfast Cereals
- Food Preparations
- Confectionary
- Snack Foods, including Popcorn, Cookies, and Crackers
- Health and Diet Products
- Sauces and Condiments
- Dog and Cat Food
- Wine, Beer, Spirits

### Products not present because they face significant barriers:

- Beef – market access
- Poultry – market access
- Organics – labeling

## SECTION V. KEY CONTACTS AND FUTURE INFORMATION

For additional information, see the [Morocco Exporter Guide](#).

### Marjane Group

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### Label Vie/Carrefour

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